

Zendesk Ticketing Portal for EVV

February 27, 2023
1:00 pm – 2:00 pm

Hosted by:
The Ohio Department of Medicaid (ODM) & Sandata Technologies

Icebreaker

What is your favorite season in the state of Ohio?

- A. Winter / snow outside
- B. Spring / fresh flowers
- C. Summer / lots of sunshine
- D. Fall, Autumn / colorful leaves



Sound Test



We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

Intended Audience

This presentation is intended for:

- » Agency providers
- » Independent providers
- » Alternate EVV vendors
- » EVV oversight entities
- » Payers and their staff
- » Any interested EVV stakeholders

Welcome!



Topics Covered Today

- What is the Zendesk Ticket Portal?
- What is a ticket, and how can I see tickets?
- What are Release Notes?
- How can I use this tool for training?
- Where can I go for help?

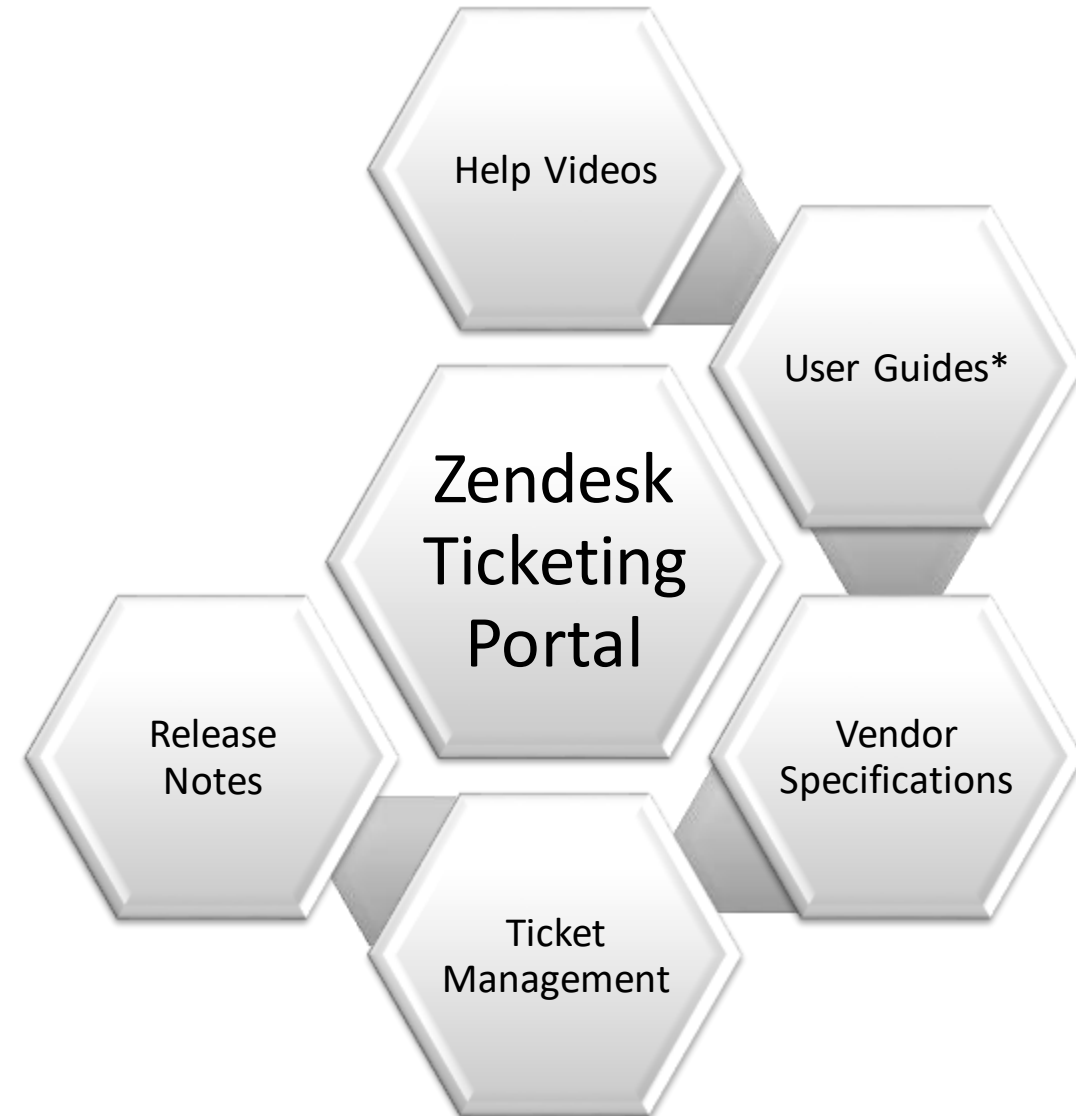
What is the Zendesk Ticket Portal?

Question

What is your experience with the Zendesk Ticket Portal?

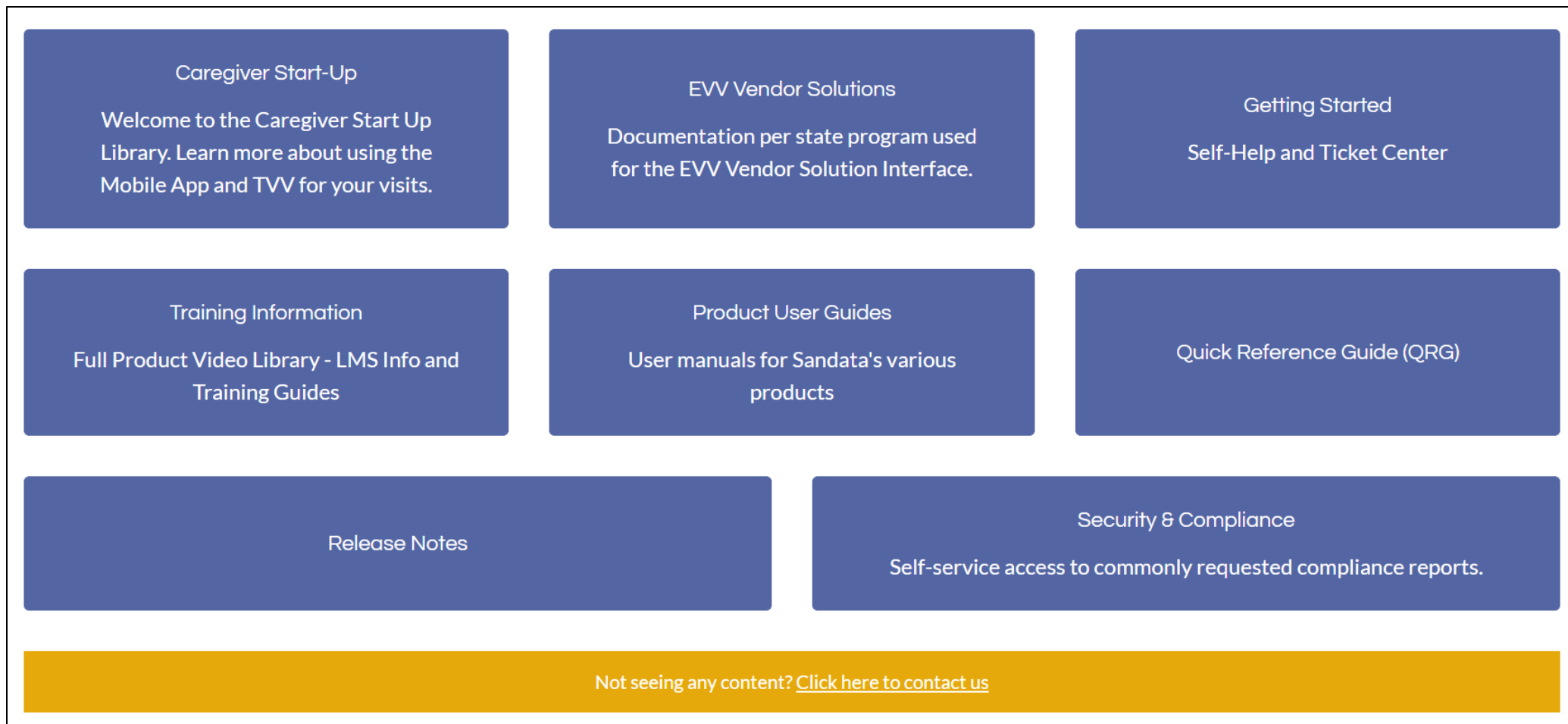
- A. I have not heard of the Zendesk Ticket Portal
- B. I have heard of the Zendesk Ticket Portal, but I have never signed in
- C. I have signed in to the Zendesk Ticket Portal before

What is the Zendesk Ticket Portal?

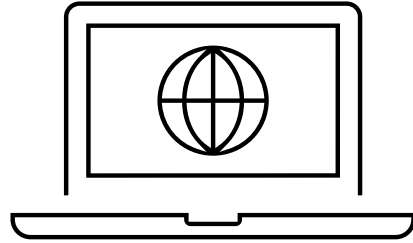


*User Guides are product-based, for state guidelines please visit the ODM EVV homepage

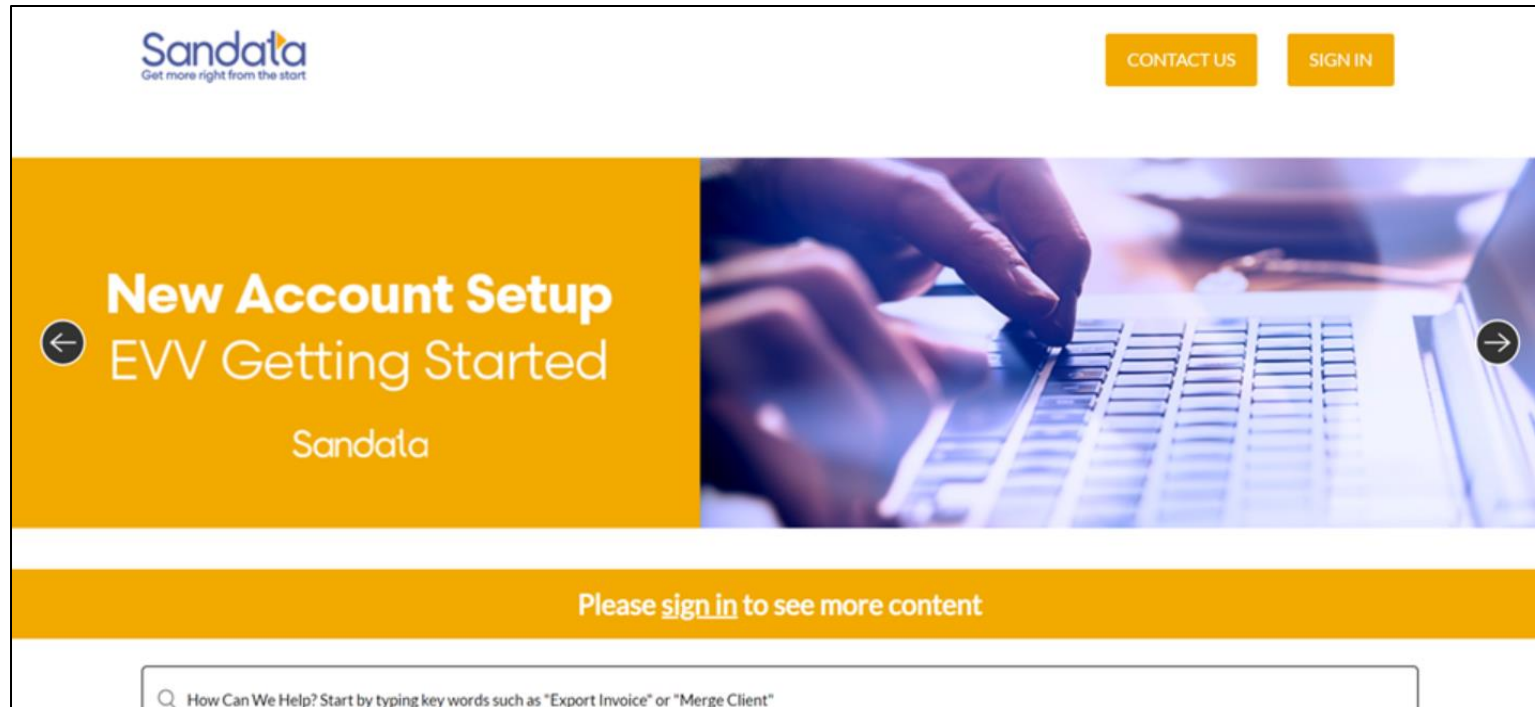
What is the Zendesk Ticket Portal?



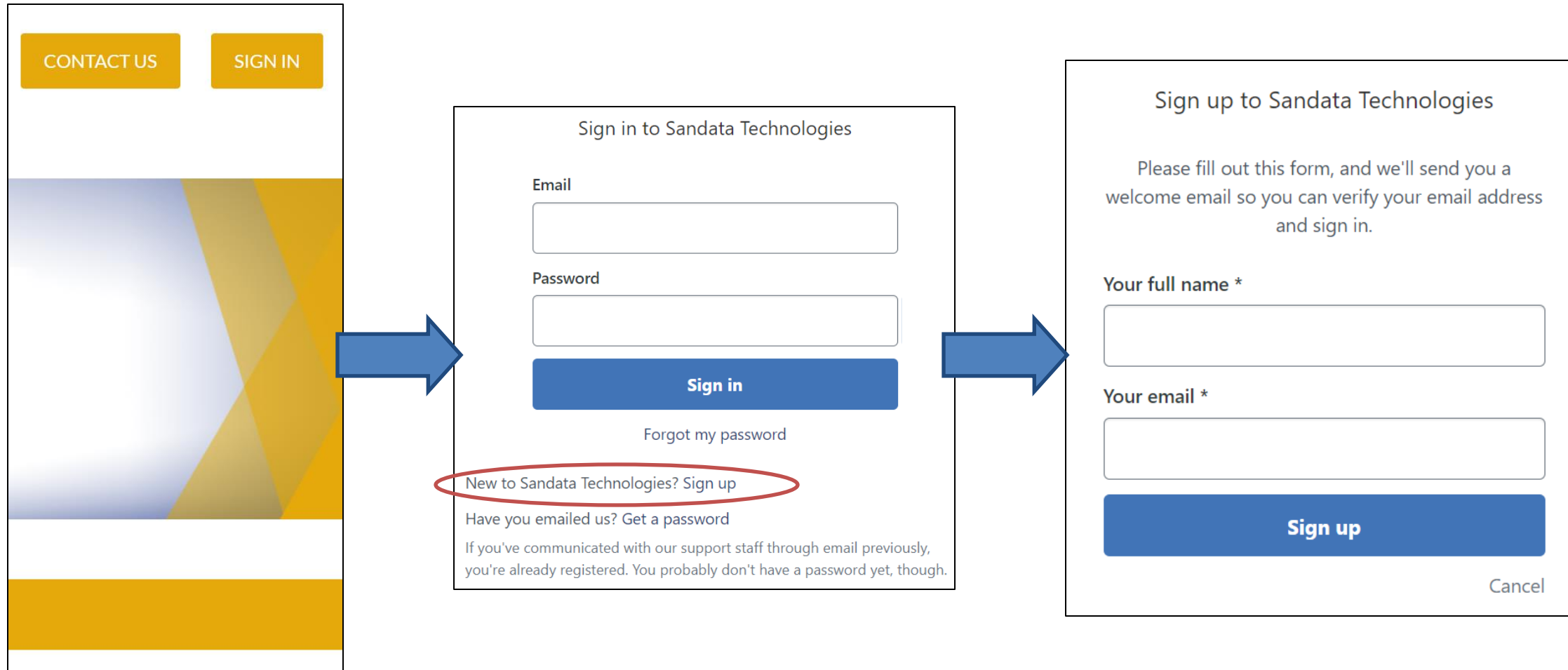
How can I access the portal?



<https://sandata.zendesk.com/>



How can I access the portal?



How can I access the portal?



If you do not receive an email, or, you see an error message, please contact the EVV provider Hotline at 855-805-3505 to assist with setup

How can I access the portal?

Choose your secret password

You'll use this password to sign in to Sandata Technologies.

Your name

Your password

Password requirements:

- ✓ must be different than the previous 5 passwords
- ✓ must be at least 6 characters
- ✓ must be fewer than 128 characters
- ✓ must be different from email address
- ✓ must include letters in mixed case and numbers
- ✓ must include a character that is not a letter or number

Set password

What is a ticket, and how can I see tickets?

Starting a new ticket

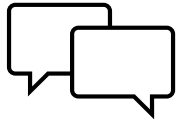
A ticket is a request for assistance submitted to the Sandata EVV Provider Hotline, or the Ohio Department of Medicaid EVV team. There are several different ways you can start a ticket.



Sending an email to ODMCustomerCareEmail@sandata.com, or ODMEVV@sandata.com



Calling the ODM EVV Provider Hotline, at 855-805-3505



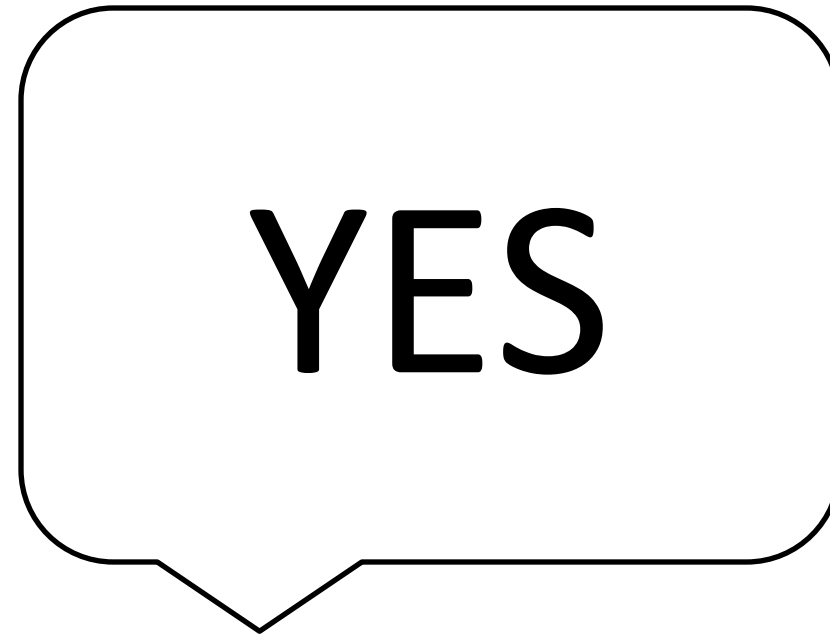
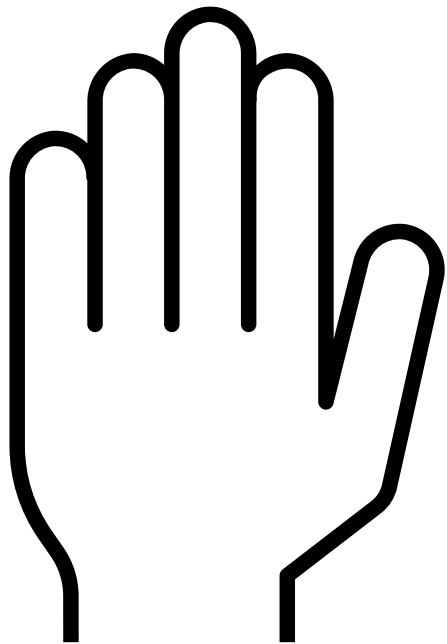
Using the messenger feature in Sandata EVV, at <https://evv.Sandata.com/>



Completing a web form in the Zendesk ticketing portal, at <https://Sandata.Zendesk.com/>

Question

If you have submitted a request for help before, please raise a hand, or type "YES" in the Q&A.



Starting a new ticket

View ticket responses from the Sandata EVV team and the Ohio Department of Medicaid.

NEW TICKET

Start a new ticket, using an interactive guide that suggests articles along the way.

MY EXISTING TICKETS

[Sign out](#)

Starting a new ticket

CONTACT US

Please select the most appropriate form from the list below.

- EVV Device Help
- EVV Portal Help – Data Entry, Visit Maintenance, and Security
- Alternate EVV
- *General Ohio Medicaid Program or Policy Question*
- Other
- EVV Device Ordering Help
- eTRAC or Welcome Kit Help

Starting a new ticket

Subject: Please describe the issue you are reporting *

Where do I add a missing call out?

The help agent suggests articles, based upon the subject.

Suggested articles

Visit Details Screen – Merge Calls

Visits Without Out Calls

Merging Calls

Merging Calls

Appendix A: Exceptions:

Visits Without Calls

Visits Without In-Calls

Starting a new ticket

Phone Number (Optional): Please provide the best number to reach you in case we have additional questions regarding your request.

555-555-5555

Select what your issue involves: *

Managing EVV portal users

Clearing visit exceptions

Manually adding a visit

Password resets

Visits not matching to claim

Other (please describe in the next box)

Starting a new ticket

A member of the Sandata support staff will respond to your request as soon as possible. If submitting after business hours, response will be on the next business day. If you have an urgent request, please contact the Customer support team at your agency's designated phone number.

Attachments

Add file or drop files here

Submit

Starting a new ticket

Ticket **218675** received. EVV Services Sandata ZD x



Sandata Technologies <support@sandata.zendesk.com>
to me ▾

Thu, Apr 29, 2021, 1:31 PM ☆ ↶ ⋮

- Please type your reply above this line -



Thank you for reaching out! We have received your inquiry and a ticket has been opened, which can be located here:
sandata.zendesk.com/hc/requests/218675.

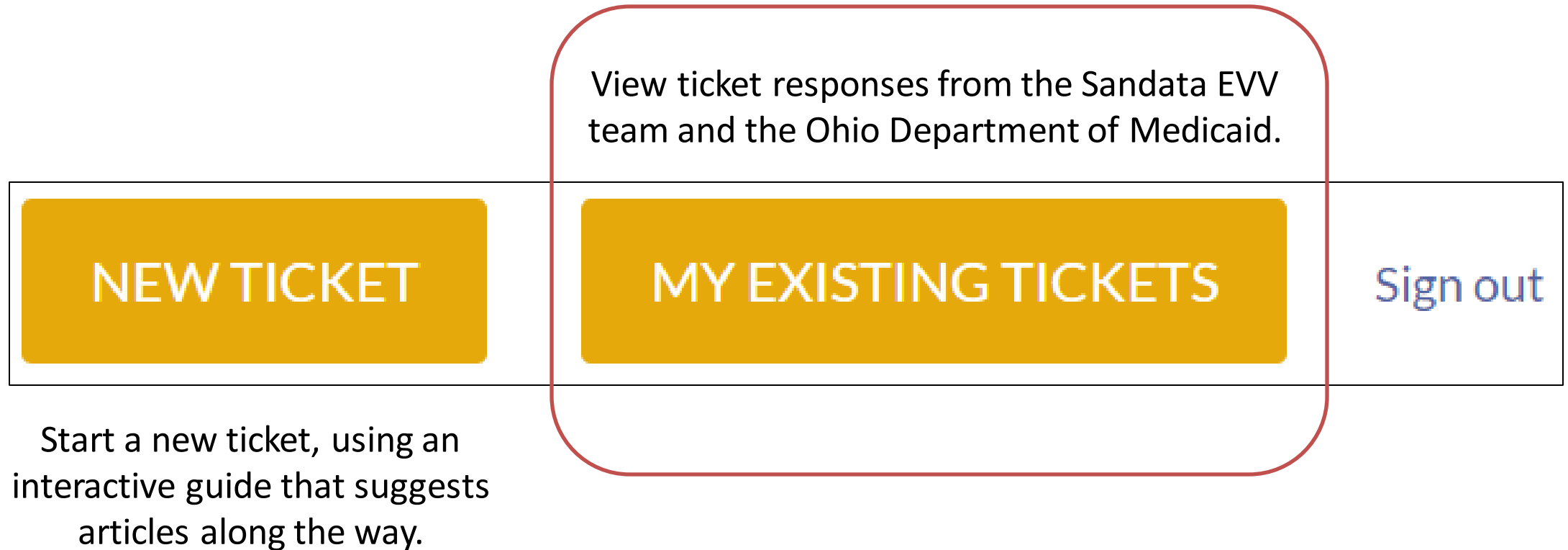
We will be in touch with you shortly.

Please be advised, if you are contacting us outside of our regular business hours, your request will be responded to on the next business day.

As a reminder, Google Chrome is the recommended browser when visiting the Sandata ticket portal.

Make it a great day!
Ohio Medicaid

Viewing Tickets



Viewing Tickets

Requests

My requests

My requests

Requests I'm CC'd on

Search requests

Status:

Any

Subject	*Ticket Number* Id	Requester	Created	Last activity ▼	Status
TEST TICKET OH ODM - eTRAC - Universal Macro - Ohio KC Demo #...	#249656	Ciera Gooden-Ohio	06/23/21 02:50 PM	2 years ago	solved

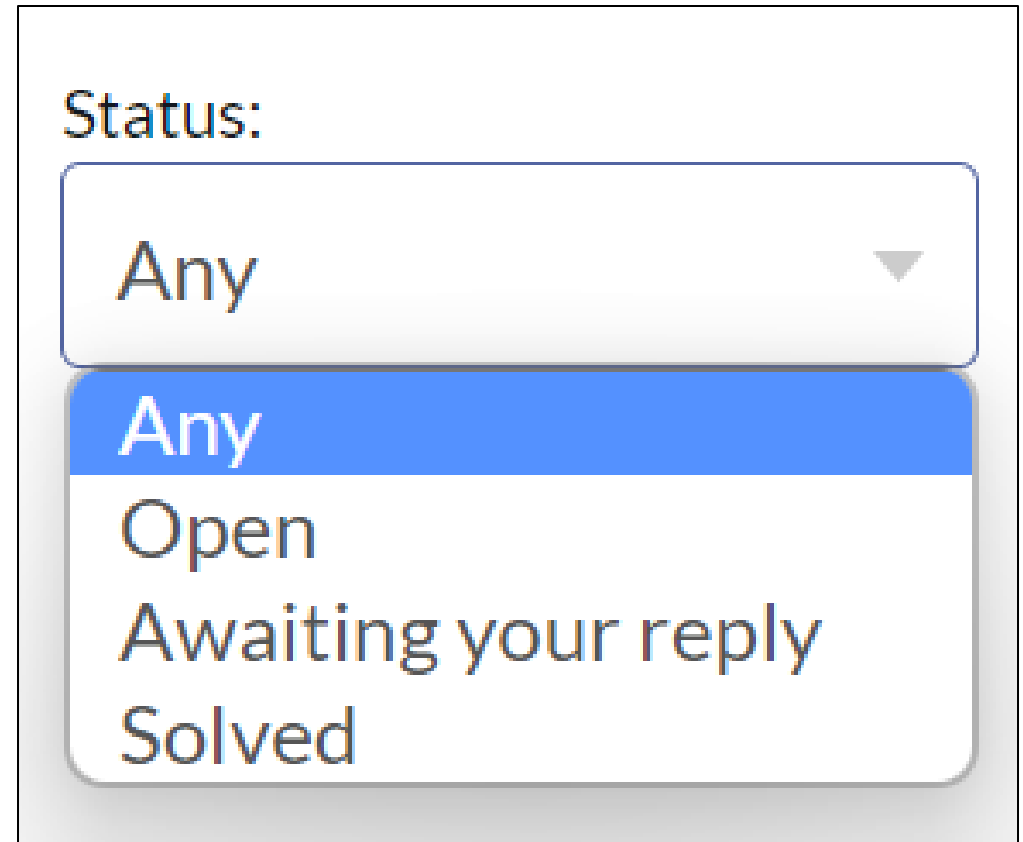
Viewing Tickets – Ticket Status

Any: View all statuses

Open: Requests that are awaiting a reply from the EVV team(s)

Awaiting your reply: Requests that are awaiting a reply from you as the provider

Solved: Requests that have been resolved (completed)



The image shows a user interface element labeled 'Status:'. Below the label is a dropdown menu. The menu is currently open, displaying four options: 'Any', 'Open', 'Awaiting your reply', and 'Solved'. The 'Any' option is highlighted with a blue background. A small downward-pointing triangle is visible on the right side of the dropdown box.

Viewing Tickets

RequestsFollowing

Sandata Technologies > My activities

TEST TICKET OH ODM - eTRAC - Universal Macro - Ohio KC Demo #249656

Ciera Gooden-Ohio

2 years ago

This is a test message for training purposes.

This request is closed for comments. You can [create a follow-up](#).

Requester

Ciera Gooden-Ohio

Created

June 23, 2021 13:50

Last activity

July 15, 2021 10:02

Id

#249656

Status

solved

Payer / Non Payer

ODM Ohio Agency Provider

Please Select Your Product

Current Products > Sandata EVV

How will I know if more information is needed?

- If a request is submitted and the EVV team would like additional information, a reply will be sent via email.



What are release notes?

What are Release Notes?

- Release notes are a scheduled list of changes to the EVV system, when the changes will take effect, and how those changes may impact providers.
- The ticket portal now including all items in the release notes. They may or may not apply to your configuration. The item's reference number is for internal use only.
- The [EVV Newsletter](#) will identify the updates that apply to Ohio providers. You can also see the audience beneath each item in the Zendesk portal.
- If the functionality is not automatically available, please contact EVV Provider Hotline for additional information (855-805-3505)

Where can I find Release Notes?

The image shows a grid of navigation buttons for various resources. The buttons are arranged in three rows. The first row contains three buttons: 'Caregiver Start-Up', 'EVV Vendor Solutions', and 'Getting Started'. The second row contains three buttons: 'Training Information', 'Product User Guides', and 'Quick Reference Guide (QRG)'. The third row contains two buttons: 'Release Notes' and 'Security & Compliance'. The 'Release Notes' button is circled in red. Below the grid is a yellow bar with a link to contact support.

Caregiver Start-Up Welcome to the Caregiver Start Up Library. Learn more about using the Mobile App and TVV for your visits.	EVV Vendor Solutions Documentation per state program used for the EVV Vendor Solution Interface.	Getting Started Self-Help and Ticket Center
Training Information Full Product Video Library - LMS Info and Training Guides	Product User Guides User manuals for Sandata's various products	Quick Reference Guide (QRG)
Release Notes	Security & Compliance Self-service access to commonly requested compliance reports.	

Not seeing any content? [Click here to contact us](#)

Where can I find Release Notes?

Sandata Technologies > Release Notes

🔍 How Can We Help?

Release Notes

Sandata Electronic Visit Verification (EVV)

Sandata Mobile Connect (SMC)

What do the Release Notes look like?

[Sandata Technologies](#) > [Release Notes](#) > [Sandata Electronic Visit Verification \(EVV\)](#)

Sandata Electronic Visit Verification (EVV)

8.15 Release Note

8.13 Release Note

8.14 Release Note

8.12 Release Note

8.11 Release Notification

8.10 Release Note

8.1.22 Release Notes



Sandata Electronic Visit Verification 8.15

Release Date: Wednesday, January 25, 2023

UNIVERSAL RELEASE NOTES

Valued Provider:

We are now including all items in the release notes. They may or may not apply to your configuration. The item's reference number is for internal use only.

In reviewing the notes below, please refer to the "prerequisites" line which indicates the required functionality, product, or audience associated with the item.

If the functionality is not automatically available, please contact your Sales Representative or Customer Care for additional information.

How do I know if the update applies to my system?

1. EDIT PHYSICIAN ICON UPDATE.

Improvement: The Physician Add/Edit icons now indicates separately whether a new record can be added, or an existing record may be edited.

User Impact: This change is to make the icons consistent throughout the system.

Ref#: EVVN-75 **Prerequisite:** ~~Sandata EVV Scheduling/Billing~~

1. CLIENT PAYER FIELDS.

Improvement: The fields in the Client Payer section on the Client's profile have a stronger emphasis on already required fields.

User Impact: The fields in the Client Payer section are now emphasized as required fields.

Ref#: SEVV-43664 **Prerequisite:** Sandata EVV Version 8

For Sandata EVV release notes, the prerequisite section will tell us which system will receive the changes. Our Ohio EVV system is **Sandata EVV Version 8**

How do I know if the update applies to my system?

1. DISMISS PASSWORD POP-UP.

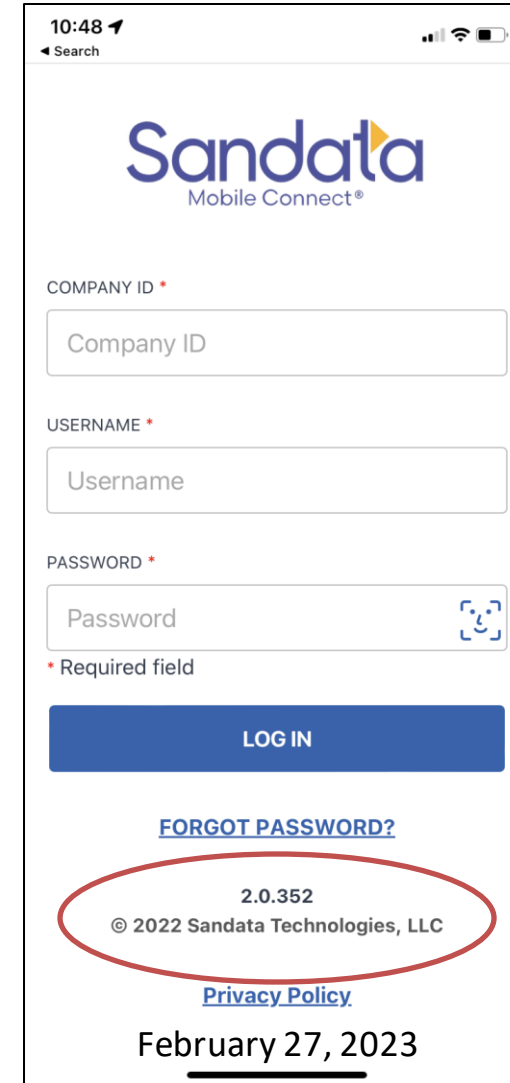
Users can now dismiss the Forgot Password pop-up by tapping the "X" in the upper right corner of the window.

Ref#:MVV-9023 **Prerequisite:None**

For Sandata Mobile Connect (SMC) release notes, the prerequisite section typically says NONE. These changes will apply to all users of SMC.

How do I know if the update applies to my system?

The most recent
version of SMC is
2.0.352



10:48

Search

Sandata
Mobile Connect®

COMPANY ID *

Company ID

USERNAME *

Username

PASSWORD *

Password

* Required field

LOG IN

[FORGOT PASSWORD?](#)

2.0.352
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[Privacy Policy](#)

February 27, 2023

Question

True or False: Release notes are a scheduled list of changes to the EVV system, when the changes will take effect, and how those changes may impact providers.



TRUE



FALSE

How can I use this tool for training?

Question

Use the Q&A function to answer the question below.

- A. I am an agency provider
- B. I am an independent provider
- C. I am a direct care worker at an agency
- D. I am a representative or other attendee (Welcome!)

Where can I find help videos?

The image displays a grid of help video categories. The 'Caregiver Start-Up' category is highlighted with a red rounded rectangle. The categories are as follows:

- Caregiver Start-Up**
Welcome to the Caregiver Start Up Library. Learn more about using the Mobile App and TVV for your visits.
- EVV Vendor Solutions**
Documentation per state program used for the EVV Vendor Solution Interface.
- Getting Started**
Self-Help and Ticket Center
- Training Information**
Full Product Video Library - LMS Info and Training Guides
- Product User Guides**
User manuals for Sandata's various products
- Quick Reference Guide (QRG)**
- Release Notes**
- Security & Compliance**
Self-service access to commonly requested compliance reports.

Not seeing any content? [Click here to contact us](#)

Where can I find help videos?

Caregiver Start-Up

Welcome to the Caregiver Start Up Library. Learn more about using the Mobile App and TVV for your visits.

Caregiver Start-Up

English Support Tools

For State specific content only, please refer to your state's Video library tile.

Where can I find help videos?

English Support Tools

For State specific content only, please refer to your state's Video library tile.

Caregiver How to Documents (English)

California (CalEVV) Videos

Pennsylvania (PA DHS) Videos

Hawaii (HI Med-QUEST) Videos

Arizona (AZ AHCCCS) Videos

Ohio (OH ODM) Videos

Direct Care Worker Video Library

Ohio Direct Care Worker Video Library

Getting started is easy! Just watch these short videos to learn the basics about recording your visits using the Sandata Mobile Connect app, Sandata EVV device, or telephone.

[▶ Play](#)

[Subscribe for updates](#)



STARTING VISITS



▶ 1 MIN

Starting a Visit

Now you're ready to start using the app. The first step is clocking in. Use this video to learn how.



▶ 1 MIN

Starting an Unknown Visit

Can't find the client in your account? This video will show you how to start visits for new clients that can't be found with their Client ID or Medicaid ID.

Summary

Caregiver Start-Up

Welcome to the Caregiver Start Up Library. Learn more about using the Mobile App and TVV for your visits.

EVV Vendor Solutions

Documentation per state program used for the EVV Vendor Solution Interface.

Getting Started

Self-Help and Ticket Center

Training Information

Full Product Video Library - LMS Info and Training Guides

Product User Guides

User manuals for Sandata's various products

Quick Reference Guide (QRG)

Release Notes

Security & Compliance

Self-service access to commonly requested compliance reports.

Not seeing any content? [Click here to contact us](#)

Summary

<https://medicaid.ohio.gov/resources-for-providers/special-programs-and-initiatives/electronic-visit-verification/electronic-visit-verification>

The screenshot shows the Ohio Department of Medicaid website. The header is dark blue with the Ohio Department of Medicaid logo on the left and navigation links: FAMILIES & INDIVIDUALS, RESOURCES FOR PROVIDERS (which is highlighted with a white underline), STAKEHOLDERS & PARTNERS, and OUR STRUCTURE ABOUT US. Below the header, a breadcrumb trail reads: Medicaid / Resources for Providers / Programs & Initiatives / Electronic Visit Verification. The main heading is 'Electronic Visit Verification' in a large, bold, dark font. Below this, a paragraph of text explains that Electronic Visit Verification (EVV) is used by caregivers for some home and community based services to document the time services begin and end. It also states that the Ohio Department of Medicaid provides an EVV system at no cost to all providers, and that agency providers may choose to use an alternate EVV system.

Ohio | Department of
Medicaid

FAMILIES &
INDIVIDUALS

RESOURCES FOR
PROVIDERS

STAKEHOLDERS
& PARTNERS

OUR STRUCTURE
ABOUT US

Medicaid / Resources for Providers / Programs & Initiatives / Electronic Visit Verification

Electronic Visit Verification

Electronic Visit Verification (EVV) is used by caregivers for some home and community based services to document the time services begin and end. The Ohio Department of Medicaid provides an EVV system at no cost to all providers. Agency providers may choose to use an alternate EVV system.

ODMEVVTraining@sandata.com

Where can I go for help?

Help is available!

- Provider 1-1 Sessions

- » Speak with a Sandata trainer in a private Zoom call, and receive help with your EVV system

- » EVV Deep Dive Series

- » The next webinar in the series will cover claims matching and reports

- » Monthly Webinar Series

- » Presenting solutions to EVV issues affecting the provider population
- » Example: Increasing Auto Verification, Getting Started with EVV

EVV Contacts

Contacts	Types of Questions Fielded
Sandata EVV Provider Hotline ODMCustomerCareEmail@sandata.com 855-805-3505 Hours of Operation: Mon-Fri, 7am-8pm, Sat-Sun, 9am-5pm	<ul style="list-style-type: none"> ▪ Sandata technical questions ▪ Device Help ▪ Getting Started with EVV ▪ EVV Visit Maintenance
ODM EVV Team ODMEVV@sandata.com 614-705-1082	<ul style="list-style-type: none"> ▪ EVV policy questions ▪ Services subject to EVV ▪ EVV and claims matching logic ▪ Alternate EVV requirements
ODM Provider Integrated HelpDesk 800-686-1516	<ul style="list-style-type: none"> ▪ Questions on account in PNM ▪ Billing questions ▪ Identify provider Medicaid provider ID ▪ Updating contact information
Medicaid Fraud medicaidfraud@medicaid.ohio.gov 800-282-0514	<ul style="list-style-type: none"> ▪ To report suspected or potential Medicaid fraud and abuse

Payer Contacts for EVV

Payer	Department	Contact Information
Aetna	Provider Relations	▪ 1-855-364-0974
AmeriHealth Caritas Ohio	Provider Relations	▪ 1-833-296-2259
Anthem	Provider Relations	▪ 1-800-462-3589
Buckeye	Provider Relations	▪ 1-866-246-4358
CareSource	Provider Relations	▪ 1-800-488-0134
Department of Developmental Disabilities (DODD)		▪ 1-800-617-6733
Humana	Provider Relations	▪ 1-877-856-5707
Molina	Provider Relations	▪ 1-855-322-4079
Ohio Department of Aging (ODA)		▪ Provider_Inquiry@age.Ohio.gov
Ohio Department of Medicaid (ODM)	EVV Integrated HelpDesk	▪ ODMEVV@sandata.com ; 614-705-1082 ▪ 1-800-686-1516
United	Provider Relations	▪ 1-800-600-9007

EVV Helpful Resources

Resource Title	Description
<u>ODM EVV Fact Sheet</u> <i>pdf document</i>	One page summary of the EVV program for providers, agency staff, case managers, and others.
<u>ODM EVV page</u> <i>Webpage</i>	The general ODM EVV webpage for providers and stakeholders.
<u>EVV Newsletters</u> <i>Webpage</i>	Monthly EVV newsletters highlighting program changes/updates. <u>Subscribe</u> to ODM EVV communications.
<u>EVV Webinars</u> <i>Webpage</i>	The ODM EVV team hosts monthly webinars and post the recording and slides from each webinar. Upcoming and historical webinars can be found on the ODM EVV webpage.
<u>EVV Tools and Helpful Documents</u> <i>Webpage</i>	ODM webpage for helpful documents on the EVV program, Sandata system, telephony, devices, payor systems and Zendesk Sandata help desk portal.

EVV Helpful Resources

Resource Title	Description
<u>Programs and Procedure Codes Included in EVV</u> <i>pdf document</i>	List of covered programs and services subject to EVV requirements, listed by payor.
<u>Time to Units Conversion</u> <i>pdf document</i>	Time to units’ conversion for EVV services, by payor.
<u>Sandata Help Desk Ticketing portal – Zendesk</u> <i>Webpage</i>	Helpdesk portal to access open and historical tickets submitted by users to Sandata and the ODM EVV team.
<u>Reports in EVV and Aggregator</u> <i>pdf document</i>	List of all reports available in the Ohio Sandata EVV and Sandata Aggregator portal, with included fields and sample use cases.
<u>EVV Device Frequently Asked Questions</u> <i>pdf document</i>	A helpful device guide, that explains the similarities and differences between the EVV device and the Bring Your Own Device option
<u>EVV General Frequently Asked Questions</u> <i>pdf document</i>	Questions from the provider community regarding policy, device orders and returns, getting started, and other EVV topics